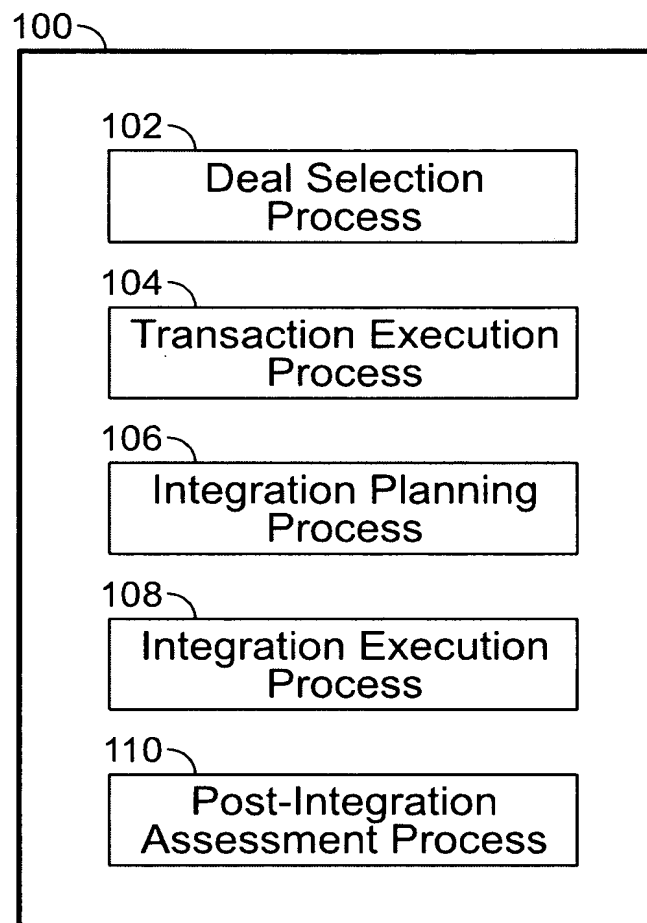


FIG. 1



**FIG. 2**

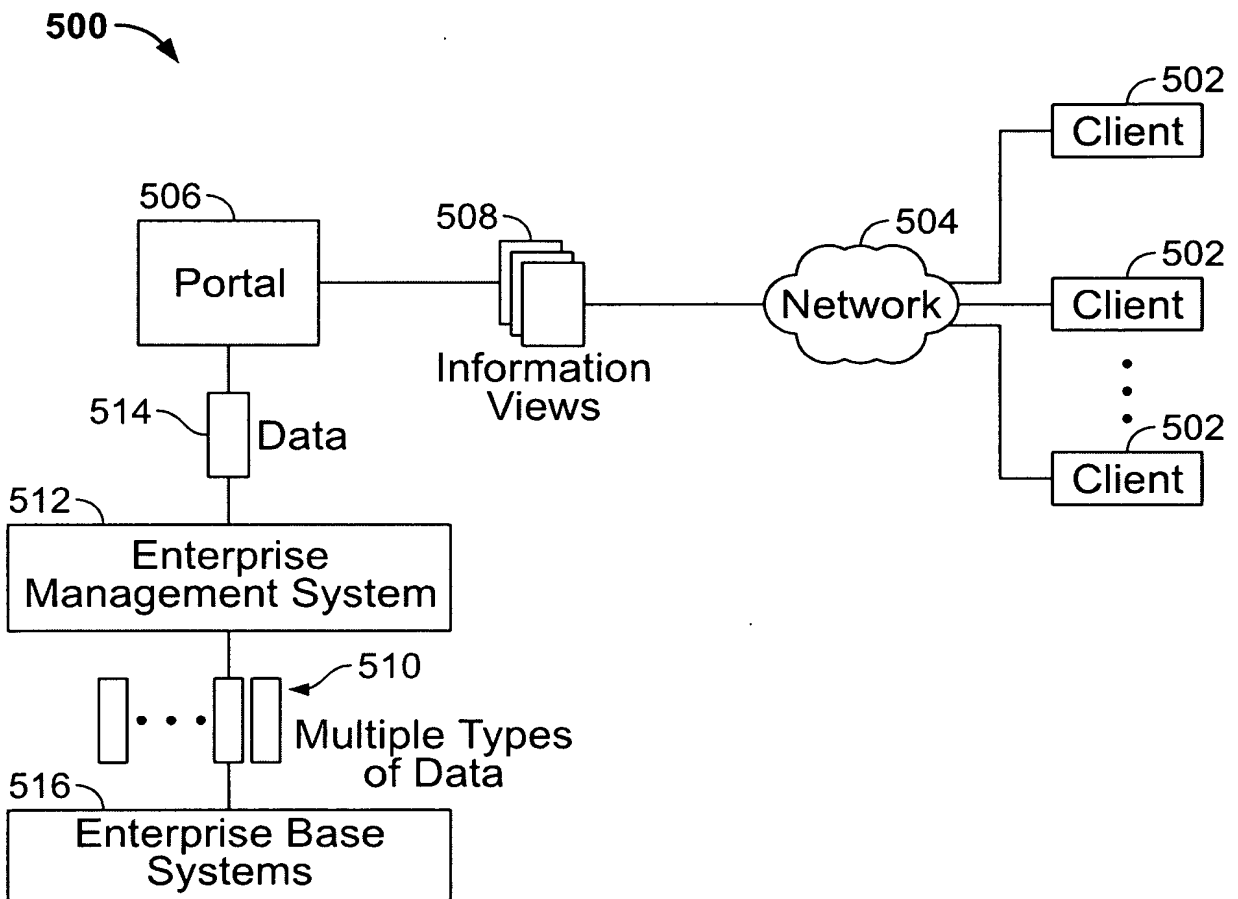


FIG. 3

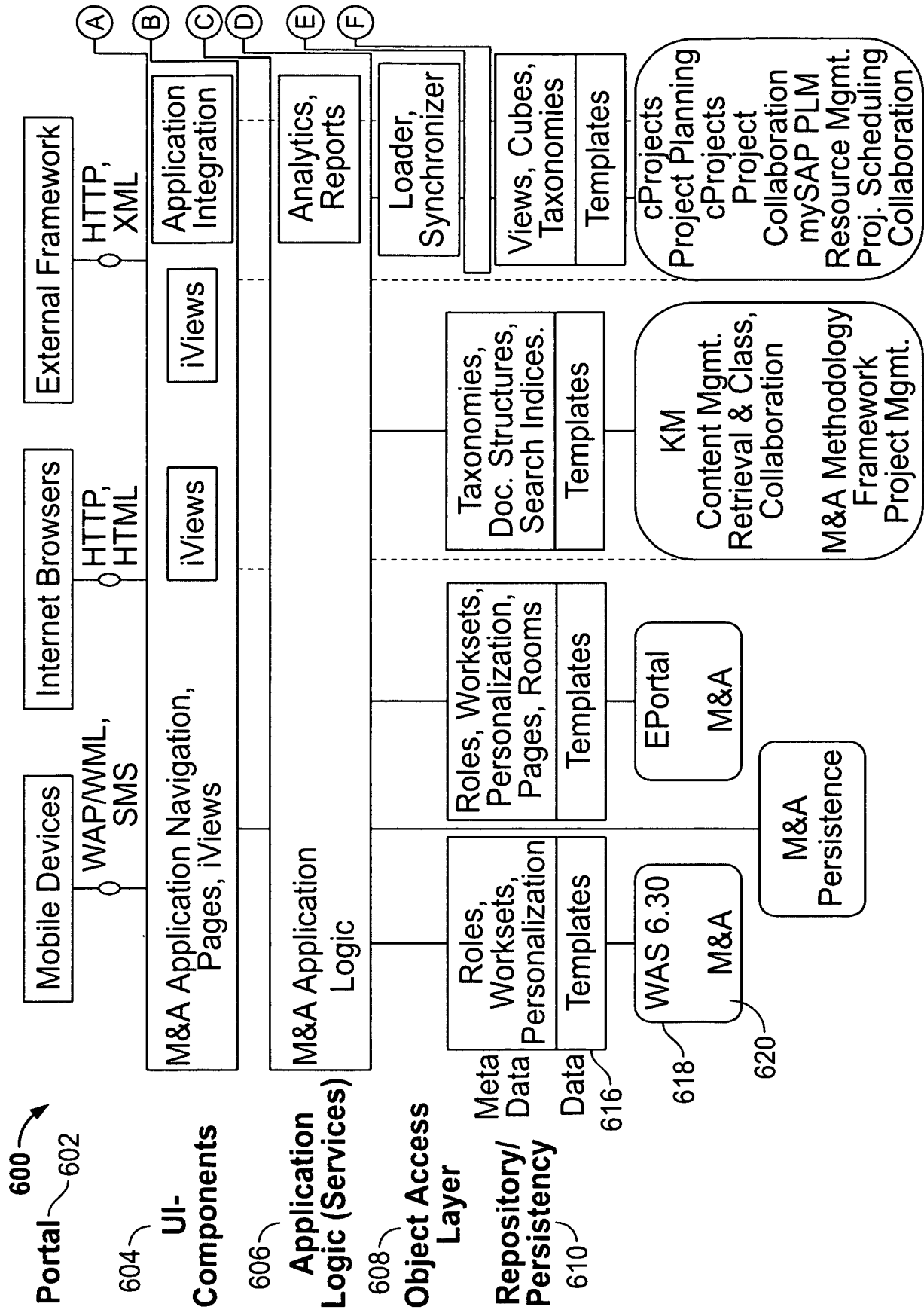
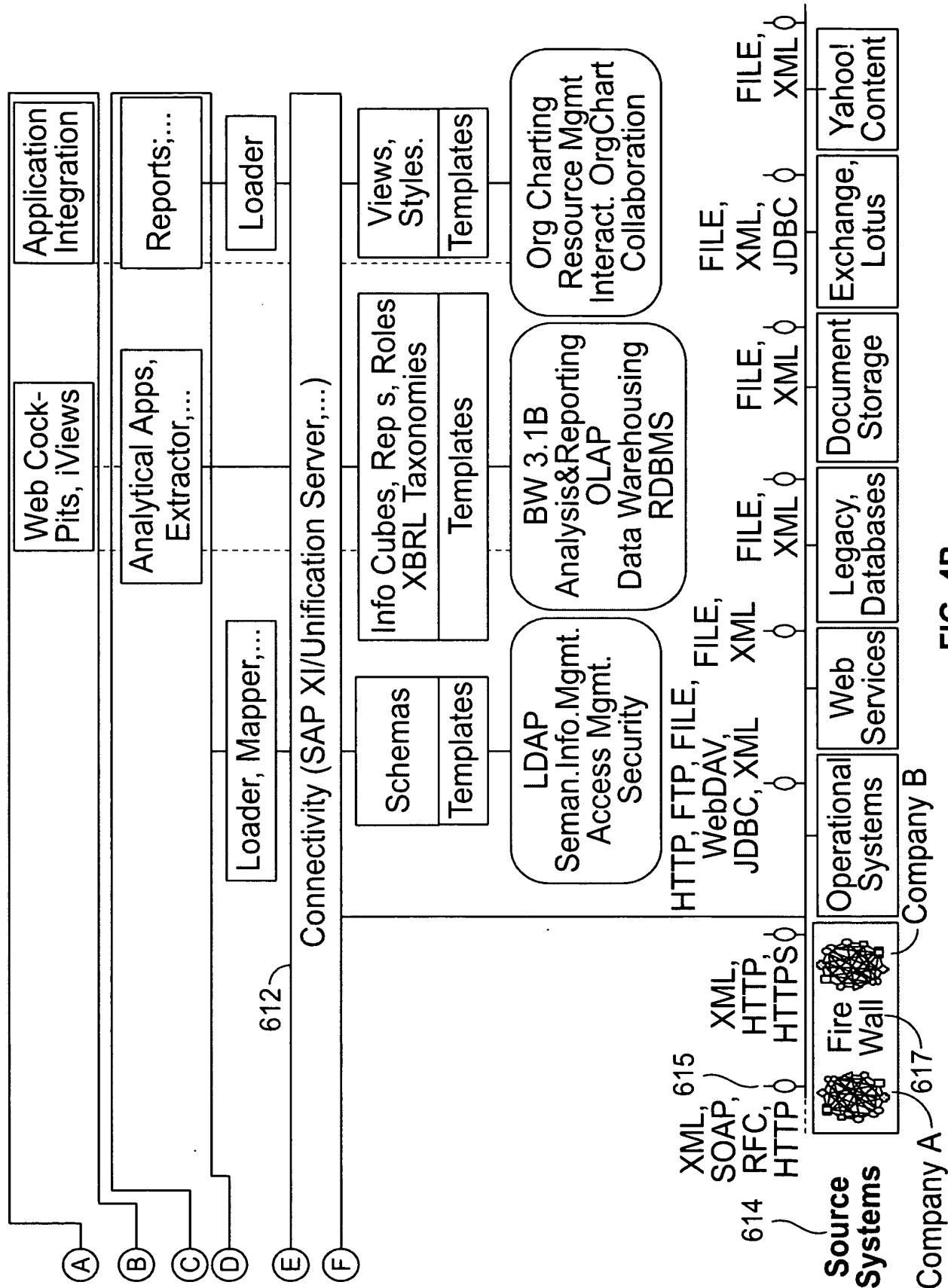


FIG. 4A



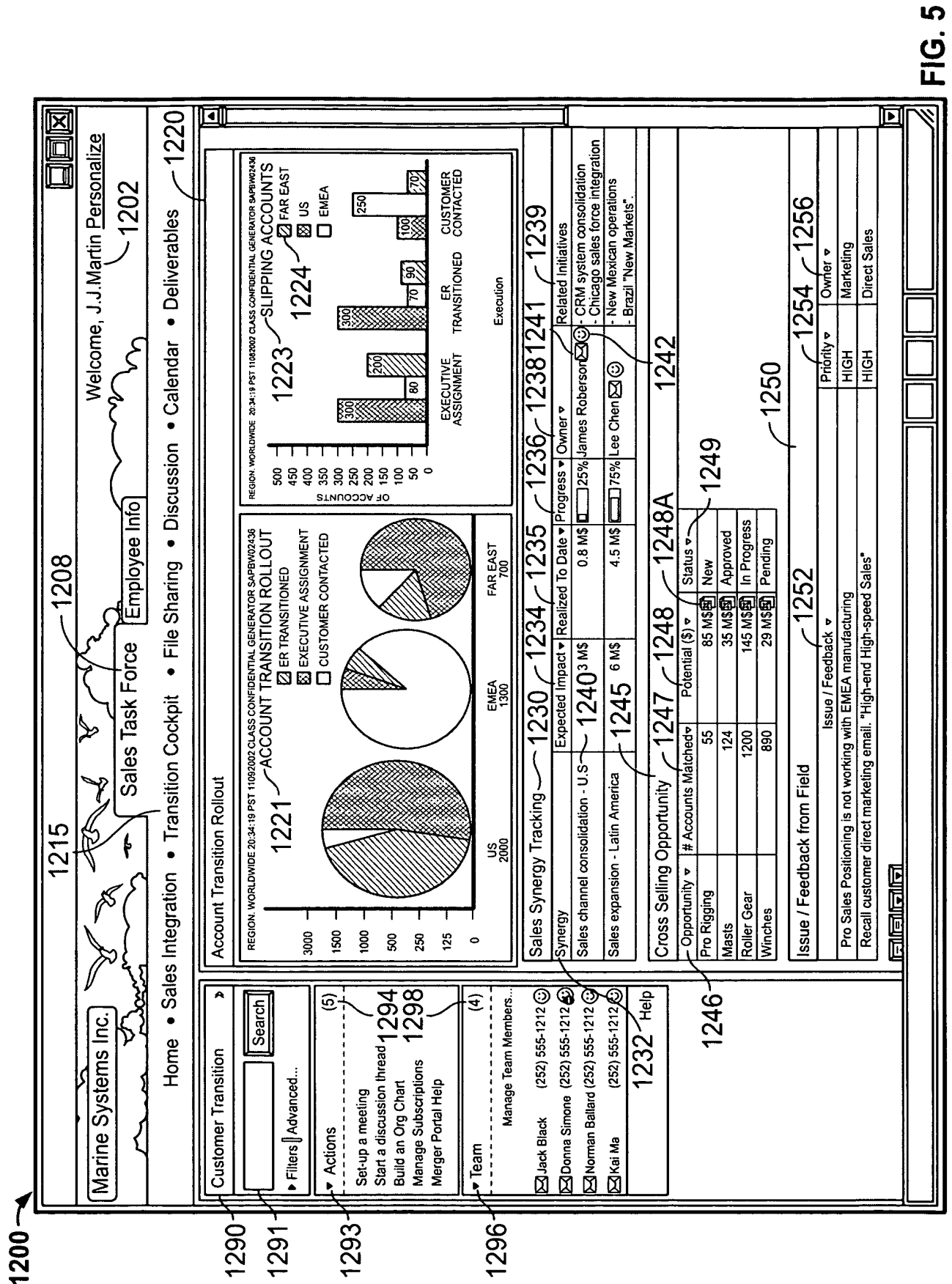


FIG. 5

1200

1215 1208

Marine Systems Inc. Welcome, J.J. Martin Personalize 1202

Sales Task Force Employee Info

Home • Sales Integration • Transition Cockpit • File Sharing • Discussion • Calendar • Deliverables

1290

Customer Transition »

1291

Search

1293

Filters | Advanced... (6)

Actions

Set-up a meeting

Start a discussion thread

Build an Org Chart 1294

Manage Subscriptions

Manager Portal Help 1261

1296

Team 1298 (4)

Manage Team Members...

☒ Jack Black (252) 555-1212 ☺

☒ Donna Simone (252) 555-1212 ☺

☒ Norman Ballard (252) 555-1212 ☺

☒ Kai Ma (252) 555-1212 ☺

Help

1281 1283

Pro Rigging 55 85 M\$ \$ New

Masts 124 35 M\$ \$ Approved

Roller Gear 1200 145 M\$ \$ In Progress

Winches 890 29 M\$ \$ Pending

Issue / Feedback from Field 1250 1252 1254 1256

Issue / Feedback

Priority Owner

HIGH Marketing

HIGH Direct Sales

Page 1/1

Sales related Initiatives for Approval

Approved Reject 1262 1260 1264 1265 1266 1267

Initiatives 1263

☐ Teak Care - Cleaning Powder

☐ Consolidating Miami Pre-sales organisation with Latin Americans

Customer Impacted Impact \$ Owner

274 8 M\$ \$ Ron Dekey ☺ HIGH

75 3 M\$ \$ Ziv Udi ☺ HIGH

Page 1/1

Customer Retention 1270 1274 1276 1278

Total 1272 U.S. EMEA Far East

75% (View survey results) 88% 90% 35% ↓

80% (View survey results) 83% 80% 50%

Marine System Inc.

Special Corporation

Customer Watch List 1280

Remove Add New 1282 1284 1285 1286 1287

Customer Revenue (1 year) Account Executives Transition Status Risk

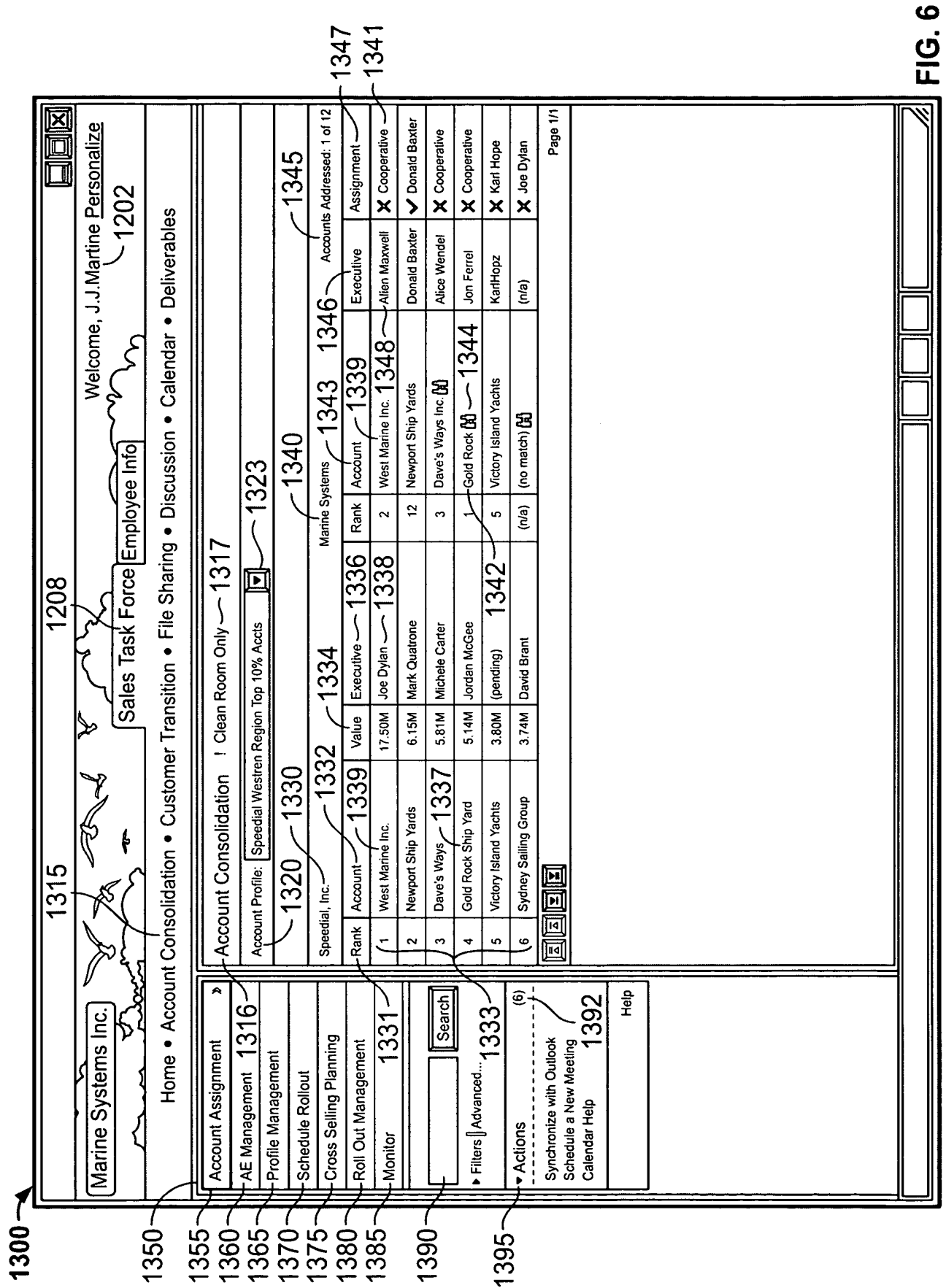
☐ Boat Barn 1.8 M\$ Bruce Williams ☺ Not Started High

☐ Newport Shipyards 2.0 M\$ George Cuelese ☺ Executive Assigned High

☐ West Marine 2.5 M\$ John Z. Dylan ☺ Contacted None

Page 1/1

FIG. 5A





1400

1315 1208

Marine Systems Inc. Welcome, J.J.Martin Personalize 1202

Sales Task Force Employee Info

Home • Account Consolidation • Customer Transition • File Sharing • Discussion • Calendar • Deliverables

1350

Account Assignment 1420

AE Management 1420

Profile Management 1431

Schedule Rollout 1425

Cross Selling Planning

Roll Out Management

Monitor

Search

Filters Advanced...

Actions (6)

Synchronize with Outlook

Schedule a New Meeting

Calendar Help

Help

1370

Schedule Rollout

Template: Default Template 1432 1440 1435 1437 1438 Account West Marine, Inc.

Status	Action Item	Action	Template	Owner	Due	Exception Handling
x	Notify AEs of account assignment	Auto Email	[define]	1434	[define]	[define] 1436
x	AE Personalized Communication	User Action	[define]	System	[define]	[define]
x	Customer Communication 1442	Auto Email	[define]	—	[define]	[define]
x	Cross-Selling Pro-Rigging Buyers	Auto Email	[define]	—	[define]	[define]
x	Retention Plan 1448	Auto Email	[define]	—	[define]	[define]

1444 1446

FIG. 7

1500

1420 Schedule Rollout 1425

1431 Template: Default Template 1432

Status	Action Item	Action	Template	Owner	Due	Exception Handling
x	Notify AEs of account assignment	Auto Email	[define]	-	[define]	[define] 1436
x	AE Personalized Communication	User Action	[define]	System	[define]	[define]
x	Customer Communication	Auto Email	[define]	-	[define]	[define]
x	Cross-Selling Pro-Rigging Buyers	Auto Email	[define]	-	[define]	[define]
x	Retention Plan 1448	Auto Email	[define]	-	[define]	[define]

1440 Notify AEs of Account Assignment

1450 1452

Save Cancel

1445 Notification Template: 1447

Standard Notification 1447

Dear Account Executives,  
Due to the acquisition of Marine Systems, we have consolidated client accounts which have counter-parts in both companies. The decision was made based on numerous factors.

1460

1462 Send to: 1470 Listed AEs

1464 Trigger Date: Day 1 + 0 days

1466 Response Due: Day 1 + 3 days

1468 Exceptions: Alert me via Email 1472 1475

FIG. 8

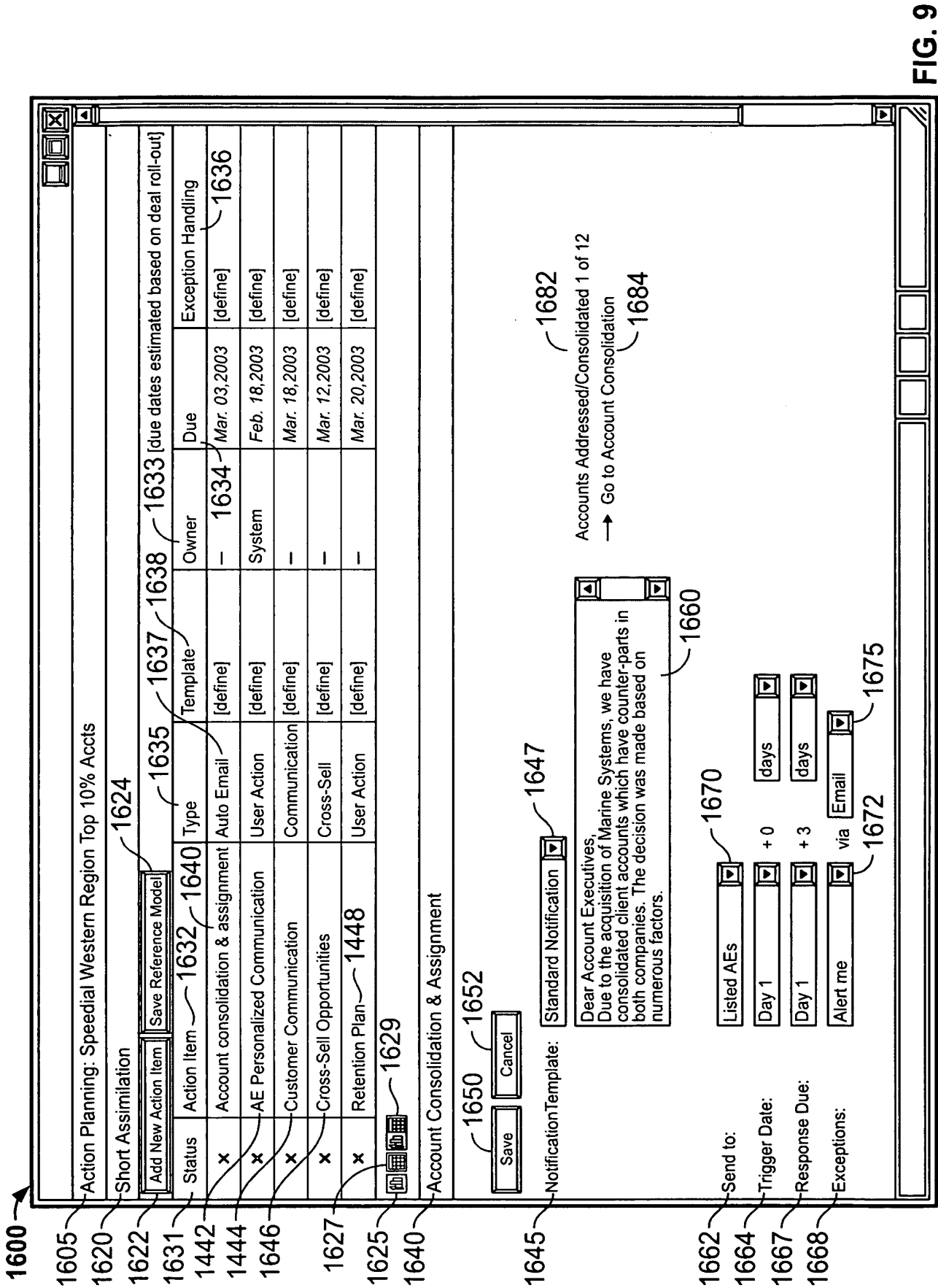


FIG. 9

1700

Account Consolidation: Speedial Western Region Top 10% Accts ! Clean Room Only ~ 1317

Speedial, Inc. ~ 1330 Marine Systems ~ 1340 Accounts Addressed: 1 of 12

Rank	Account ~ 1332	Value	Executive ~ 1336	Rank	Account ~ 1343	Executive ~ 1346	Assignment ~ 1347
1	West Marine Inc. ~ 1339	17.50M	Joe Dylan ~ 1338	2	West Marine Inc. ~ 1339	Allen Maxwell ~ 1348	X Cooperative ~ 1341
2	Newport Ship Yards	6.15M	Mark Quatrone	12	Newport Ship Yards	Donald Baxter	✓ Donald Baxter
3	Dave's Ways	5.81M	Michele Carter	3	Dave's Ways Inc. [X]	Alice Wendel	X Cooperative
4	Gold Rock Ship Yard	5.14M	Jordan McGee	1	Gold Rock [X]	Jon Ferrel	X Cooperative
5	Victory Island Yachts	3.80M	(pending)	5	Victory Islands Yachts	Karl Hope	X Karl Hope
6	Sydney Sailing Group	3.74M	David Brant	(n/a)	(no match) [X]	(n/a)	X Joe Dylan

Page 1/1

Account

1711 1712

West Marine, Inc.

1713

DUNS: 843,081.22 Customer Contact: Jones Ferguson [X]

1727 1725

[ ] Decision Thread Account Details

Current Assignment: Cooperative  
Select an executive as Account Executive [Lead]. You can also Assign Another Executive

1738 1742

Joe Dylan

Assign as Lead

Tenure: 4 years

Account Impact on Income: [ ] 65%

Total Assigned Accounts:

Account	Value	Assignment
West Marine ~ 1760	17.5M	Cooperative
Boston Whaler	0.42M	Transition
Miami Performance	0.40M	Cooperative
Lado Yachts Sales	0.15M	No Conflict

Comments: Add Comment ~ 1774

This one will be tricky. Joe has relationships with many of our top customers and I don't want to overwork him [Jonathan Frank [X]]  
Actually, Joe is actually very good friends with West Marine's CEO. Their families go sailing and they are college buddies We need to be balanced [Richard]

1733 1742

1751

Allen Maxwell [X]

Assign as Lead

Tenure: 6 years

Account Impact on Income: [ ] 28%

Total Assigned Accounts:

Account	Value	Assignment
Atlantic Ship Yards	21.5M	No Conflict
West Maine	8.09M	Cooperative
Steven's Boat Repairs	1.30M	No Conflict

Comments: Add Comment

This is not Allen's main account Plus, he has other more important accounts coming up [Jonathan Frank [X]]

1730 ~ Speedial, Inc.

1741

Manager: Bob Jones [X]

Account Impact on Income: [ ] 28%

Total Assigned Accounts:

Account	Value	Assignment
Atlantic Ship Yards	21.5M	No Conflict
West Maine	8.09M	Cooperative
Steven's Boat Repairs	1.30M	No Conflict

Comments: Add Comment

This is not Allen's main account Plus, he has other more important accounts coming up [Jonathan Frank [X]]

1734 ~ 1340

1741

Manager: Hannah Jones [X]

Account Impact on Income: [ ] 28%

Total Assigned Accounts:

Account	Value	Assignment
Atlantic Ship Yards	21.5M	No Conflict
West Maine	8.09M	Cooperative
Steven's Boat Repairs	1.30M	No Conflict

Comments: Add Comment

This is not Allen's main account Plus, he has other more important accounts coming up [Jonathan Frank [X]]

**FIG. 11**



2000

18151208

Marine Systems Inc.

Welcome, J.J.Martin

Personalize

Sales Task Force

Employee Info

1202

Home • Sales Integration • Transition Cockpit • File Sharing • Discussion • Calendar • Deliverables

Action Planning

Account Consolidation

AE Management

Cross Selling Planning

Monitor

1631

Search

Filters || Advanced...

Actions

(3)

Add New Action

Manage Templates

Manage Profiles

2020

Team

(5)

Manage Team Members...

J.J. Martin (252) 555-1212

Emma Besson (252) 555-1212

Hari Ashvini (252) 555-1212

Jeff Naka (252) 555-1212

Help

Action Planning: Speedial Western Region Top 10% Accts

1605

Short Assimilation

1620

Add New Action Item

Save Reference Model

(due dates estimated based on deal roll-out)

1638163316341636

Status	Action Item	Type	Template	Owner	Due	Exception Handling
✓	Account Consolidation & Assignment	Auto Email	Standard AE Transfer	System	Day 1	Email Martin
✗	AE Personalized Communication	User Action	[define]	System	Feb 18, 2003	[define]
✗	Customer Communication	Communication	[define]	—	Mar 18, 2003	[define]
✗	Cross-Sell Opportunities	Cross-Sell	[define]	—	Mar 12, 2003	[define]
✗	Retention Plan	User Action	[define]	—	Mar 20, 2003	[define]

1696

Cross-Sell Opportunities

2010

Opportunities

Financials

Save

Cancel

2035

Opportunity Name:

for Special West Customers

2044

Actions:

2045

Notification Templates:

Cross sell opportunity alert

2070

via

Email

2065

2062

Send to:

Listed Account Executives

2076

Day 1

+ 0

2075

days

days

2064

Trigger Date:

FIG. 13

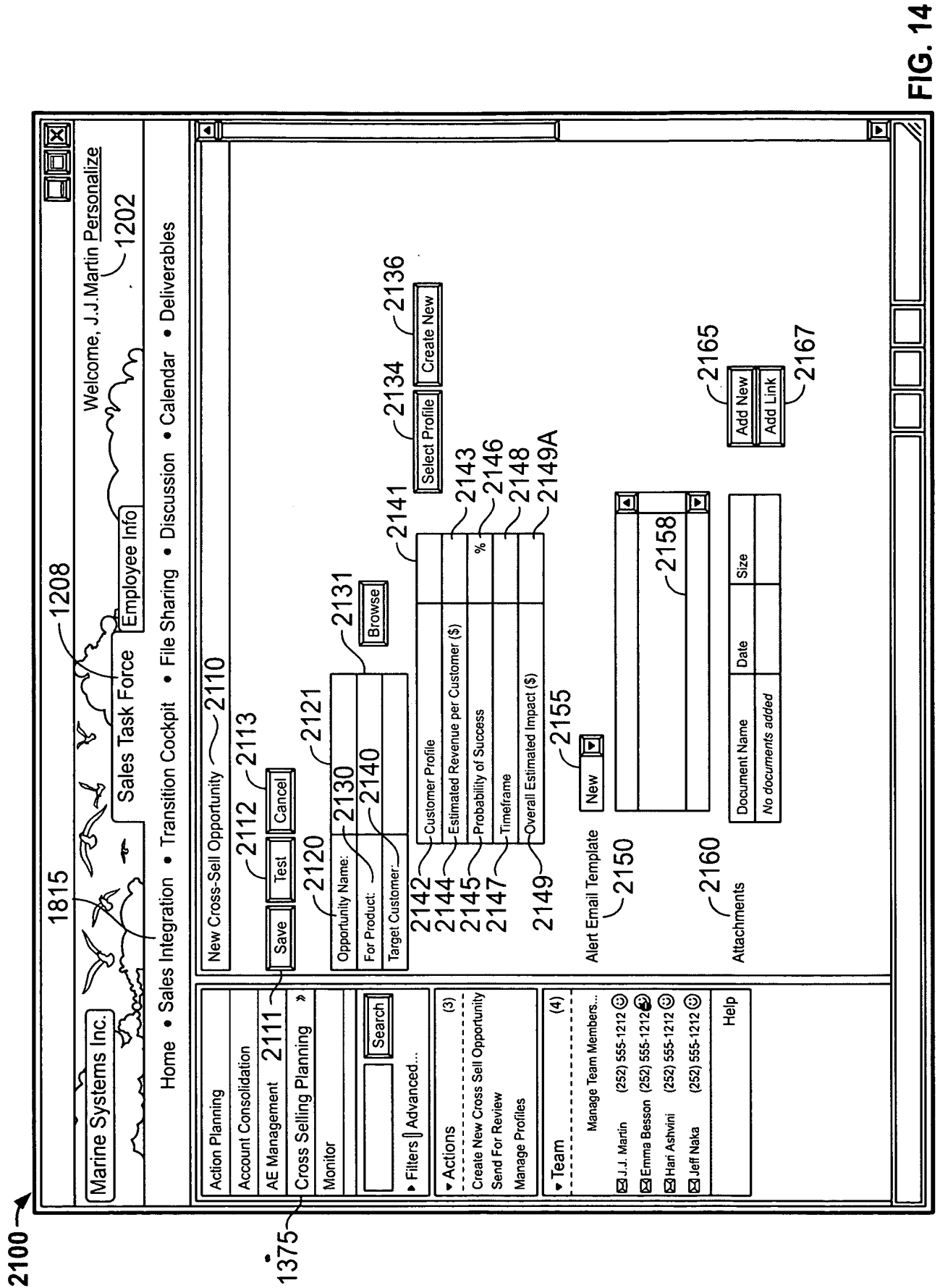


FIG. 14



2200

1208

1202

Welcome, J.J.Martin Personalize

Marine Systems Inc.

Sales Task Force Employee Info

Home • Sales Integration • Transition Cockpit • File Sharing • Discussion • Calendar • Deliverables 2240

2215

Announcements 2210

Create new view: Today | Last 7 days | All announcements Compact | Verbose

06/03/02 Christopher Jacobs  
Welcome to the Operations Task Force  
This portal is intended to aid your job during the merger of Offshore and Speedial. The Steering Committee will ask for a set of proposals from your task force. The task...  
Read

2220

Operations Task Force Team

Refresh times | See other teams

Name	Role:	Primary Phone	Local Time	IMessage
<input checked="" type="checkbox"/> Enrique Martinez	TF Lead (IT)	(252) 555-4857	3:07 pm	<input checked="" type="radio"/> Available
<input checked="" type="checkbox"/> Bob Arnold	Facilities US	(212) 954-9368	3:07 pm	<input checked="" type="radio"/> Available
<input checked="" type="checkbox"/> Elizabeth Brown	Property Manag...	(404) 399-0086	3:07 pm	<input checked="" type="radio"/> Busy
<input checked="" type="checkbox"/> Li Chen	Facilities Asia	+866 02 586-3409	3:07 am	<input checked="" type="radio"/> Away
<input checked="" type="checkbox"/> Joe Douglas	IT Europe	+33 1 40 88 84 49	9:07 pm	<input checked="" type="radio"/> Available
<input checked="" type="checkbox"/> Martin Ellis	Facilities Europe	(404) 901-8943	3:07 pm	<input checked="" type="radio"/> Available
<input checked="" type="checkbox"/> Mark Michaels	Networks IS	(619) 345-7801	12:07 pm	<input checked="" type="radio"/> At Lunch

2223

My Deliverables

View all deliverables

Assigned Managed

Due	Name	Stat
07/25/02	IT Infrastructure	<input checked="" type="radio"/>
08/16/02	Facility Management	<input checked="" type="radio"/>
09/20/02	IT Rollout Schedule	

2260

My Meetings

Synchronize Outlook View Calendar

Date	Event
07/01/02	Milestone 1 (Atlanta)
07/11/02	Milestone 2 (Video Conf.)
07/25/02	Milestone 3 (San Diego)
08/16/02	Milestone 4 (Atlanta)
09/05/02	Milestone 5 (Atlanta)

FIG. 15

2300

2335

1208

Marine Systems Inc.

Welcome, J.J.Martin

Personalize

1202

Procurement Task Force

Employee Info

2320

Home • Account Consolidation • Customer Transition • File Sharing • Discussion • Calendar • Deliverables

Operations Files

Merger Team Files

2325

2330

Search

Filters | Advanced...

Actions

2350 (3)

Schedule a new meeting

Synchronize with Outlook

Help with Calendar

2355

Team

2360 (5)

Manage Team Members...

☒ Carol Dillard (252) 453-4534

☒ Ron Sawyer (212) 345-9012

☒ Clint Brooks (404) 908-3429

☒ Julia Walburg (713) 679-0992

☒ Sven Pietz (619) 229-5771

My Meetings (5)

Sync Outlook... | View Calendar...

02/05/03 Milestone 1 (Atlanta)

02/08/03 Milestone 2 (Video Conf...)

02/09/03 Milestone 3 (San Diego)

02/15/03 Milestone 4 (Atlanta)

02/19/03 Milestone 5 (Paris)

Help

Operations Task Force Files

2315

2340

Search

Show Options

Folders In Operations Task Force

☐ Merger Team

Details | NewFolder

☐ General Relevant Info

☐ Info Sessions

☐ Integration Survey

☐ Milestones and SCMs

Details | Delete

☐ Town Hall Meetings

☐ WIP Shared

Details | Delete

Documents Operations Task Force

2370

Sort by: Name

↑↓

New File | New Text File | New Link

Name	2380	Modified	Size
<input checked="" type="checkbox"/> Global telephone list Offshore-Speedial.xls		2/19/02 10:06:31 AM	125.5 KB
<input checked="" type="checkbox"/> Offshore Info Session 6-2-2002.ppt	2385	4/2/02 8:53:49 AM	1.1 MB
<input checked="" type="checkbox"/> Offshore Plants US.gif		2/7/02 2:19:16 PM	85 KB
<input checked="" type="checkbox"/> Speedial site map San Diego.gif		2/7/02 2:05:37 PM	320.5 KB
<input checked="" type="checkbox"/> Team Contacts.ppt		2/27/02 6:03:42 AM	131.5 KB

FIG. 16

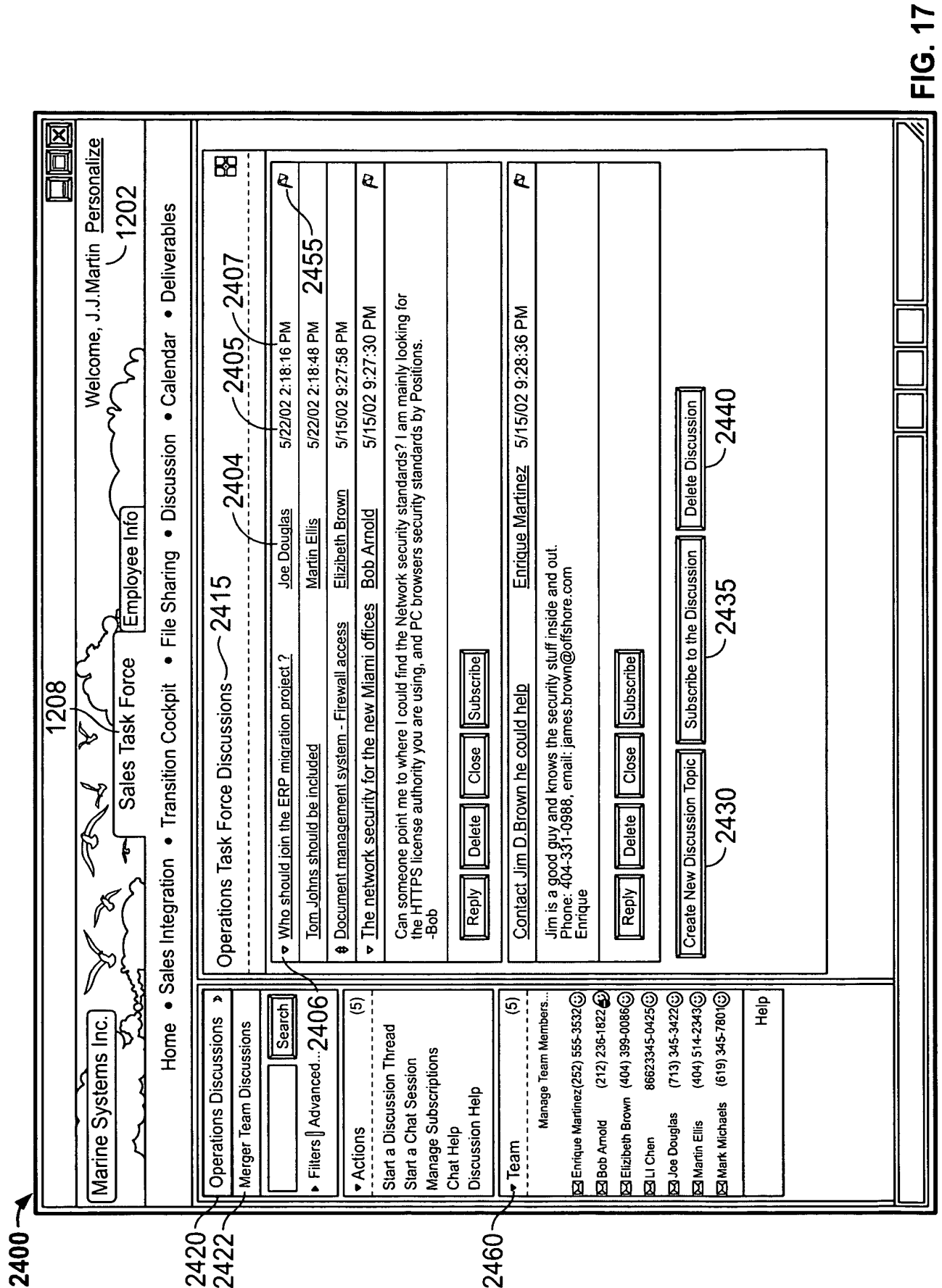


FIG. 17

2500

Marine Systems Inc.

Welcome, J.J. Martin Personalize

1208

Sales Task Force

Employee Info

1202

Home • Sales Integration • Transition Cockpit • File Sharing • Discussion • Calendar • Deliverables 2515

Deliverables Menu

Search

Filters Advanced... 2531

Actions (6)

View my Calendar

Set up a Meeting

Upload Files

Manage Subscriptions

Re-assign This Deliverable

Deliverable Help

Tools (3)

IT Talent Identification & Retention

IT Standardization Assessment

IT Budget Estimator

Help

Deliverable Portfolio 2525

2527

My Assigned Deliverables

Title	Task Force	Assigned By	Due Date	Status
Consolidate Sales Force	Project Management	Carol Dillard	November 1, 2003	Not Started

2532

2529

2533

2534

2535

My Requested Deliverables

Title	Task Force	Assigned By	Due Date	Status
You currently have no requested deliverables				

FIG. 18

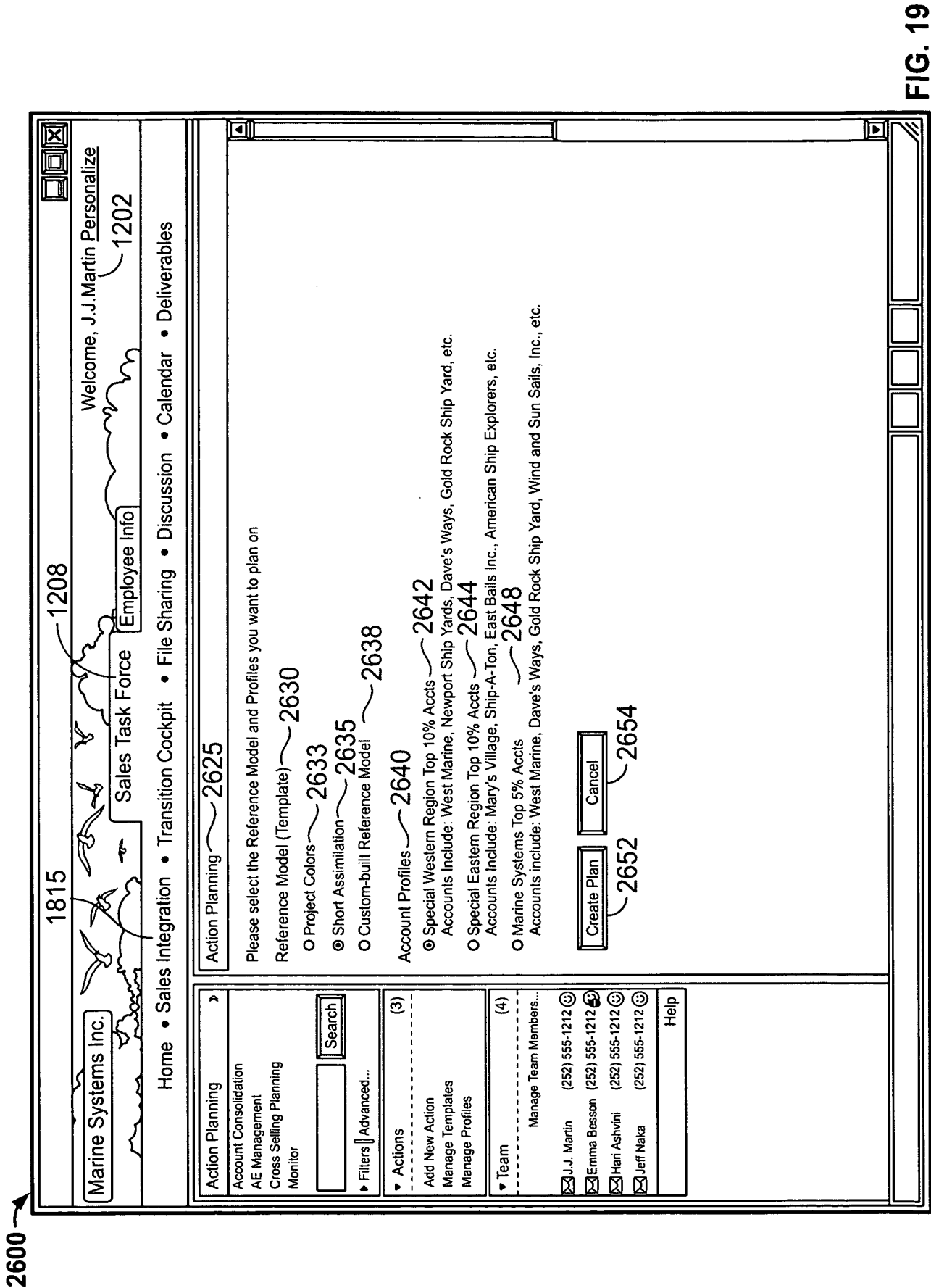


FIG. 19

2700

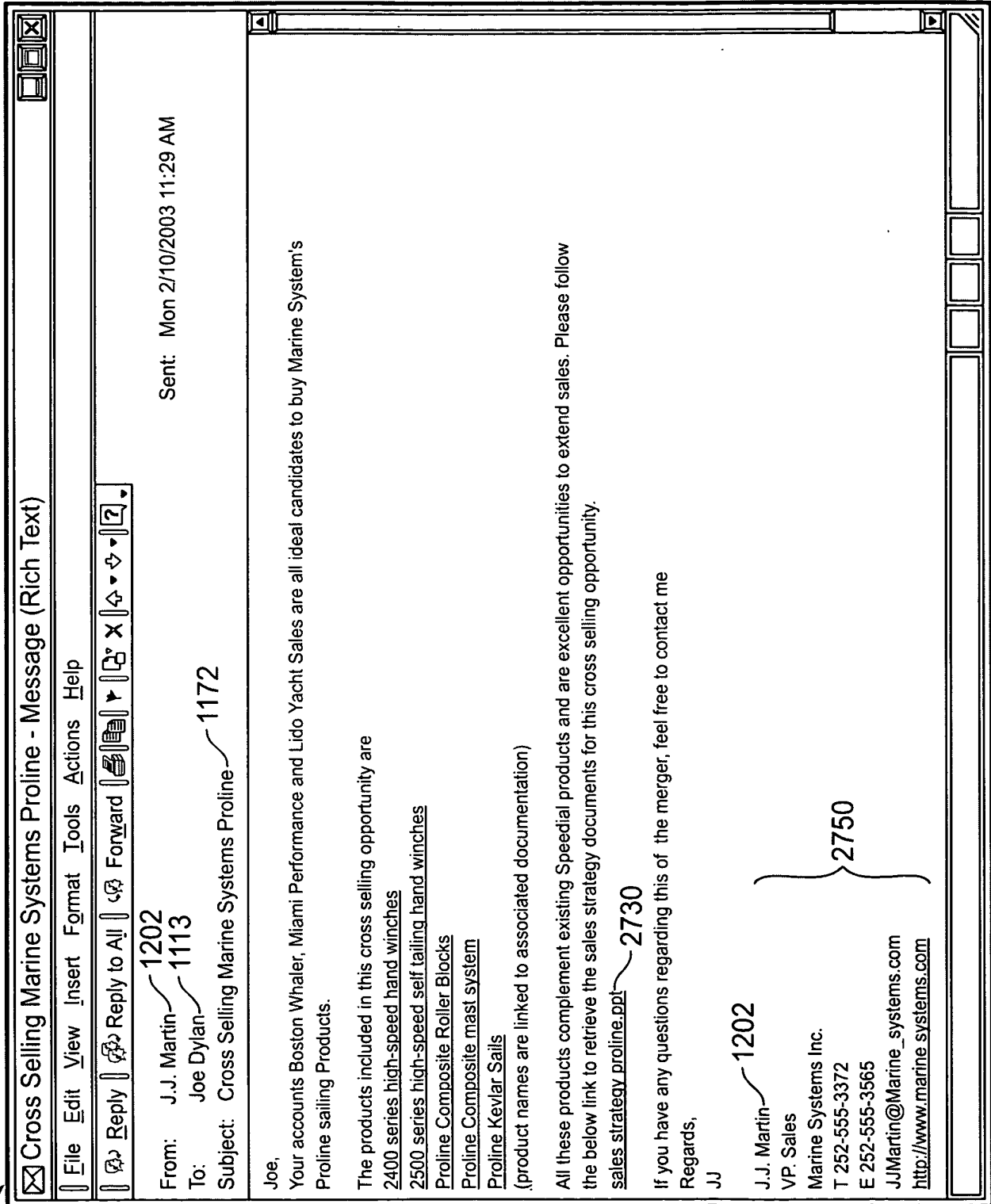


FIG. 20

2800

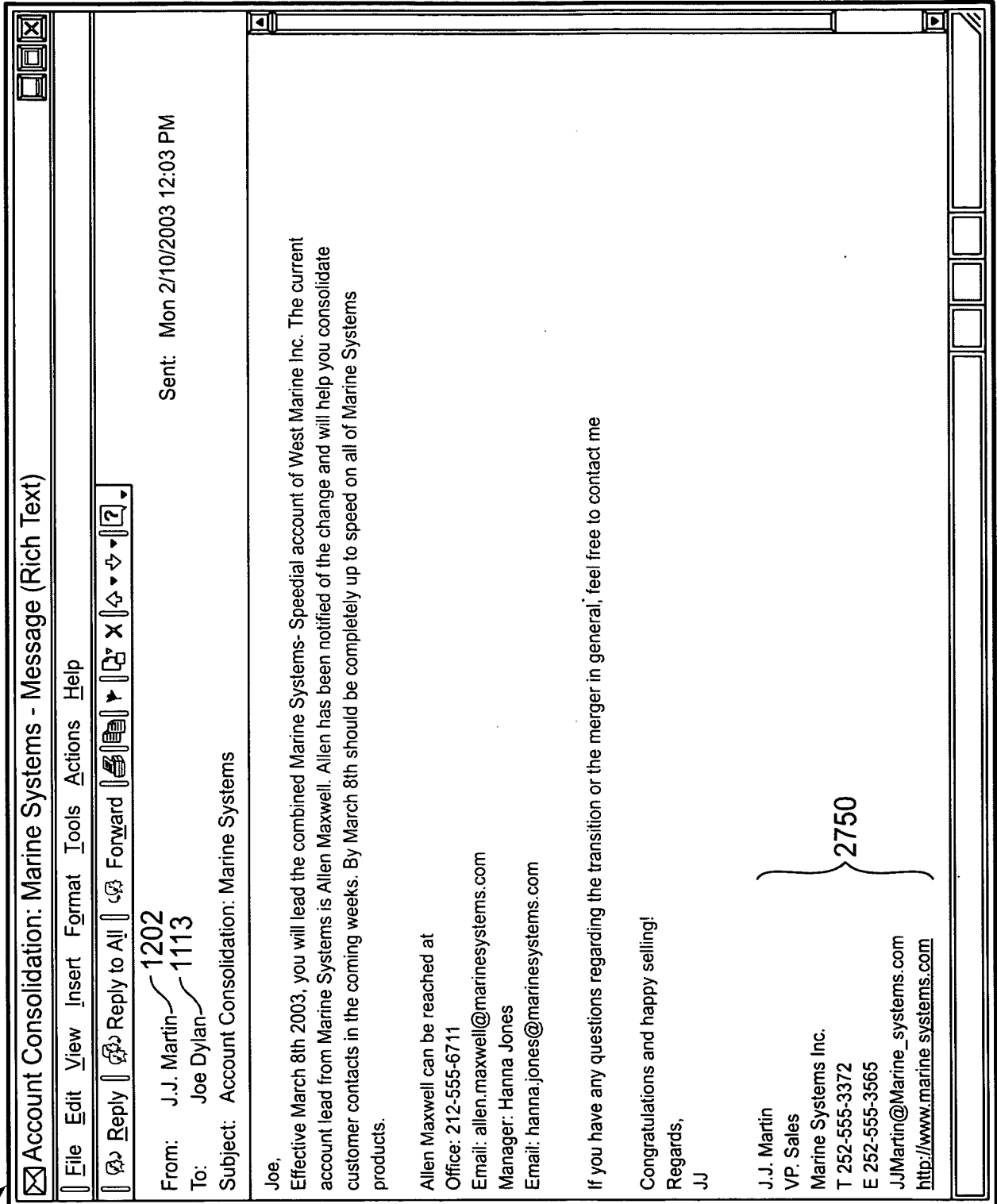
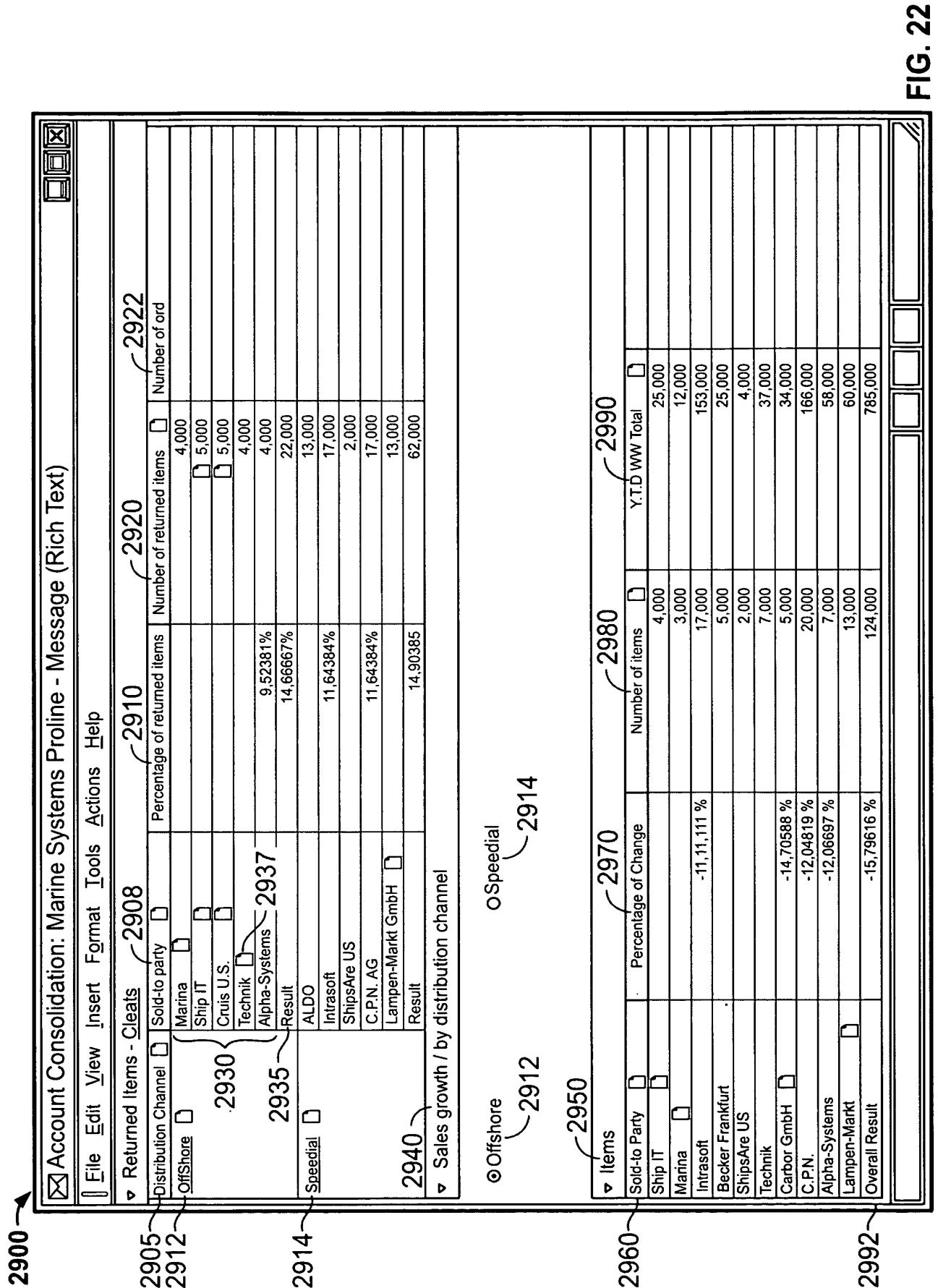


FIG. 21







**FIG. 23**

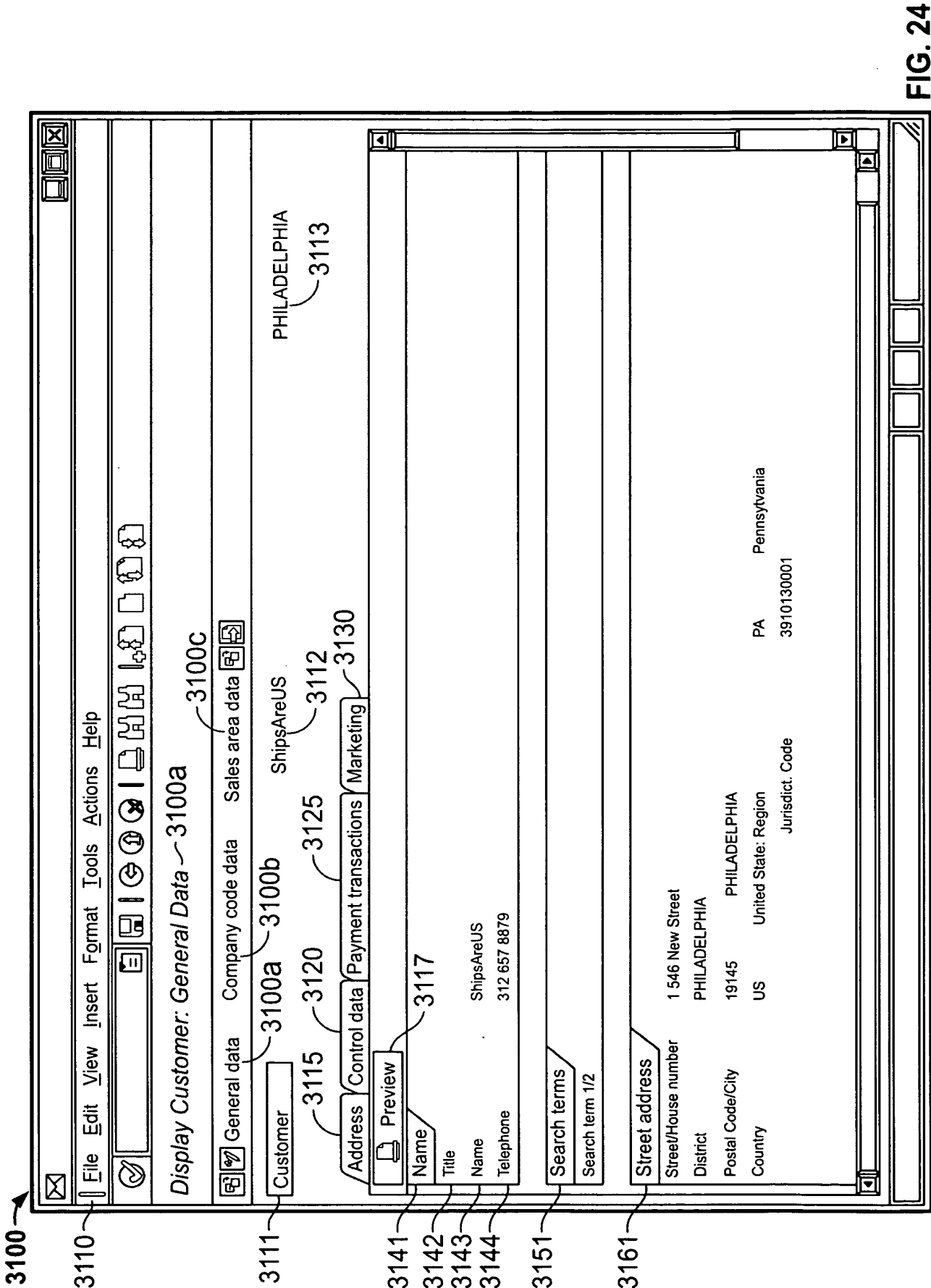
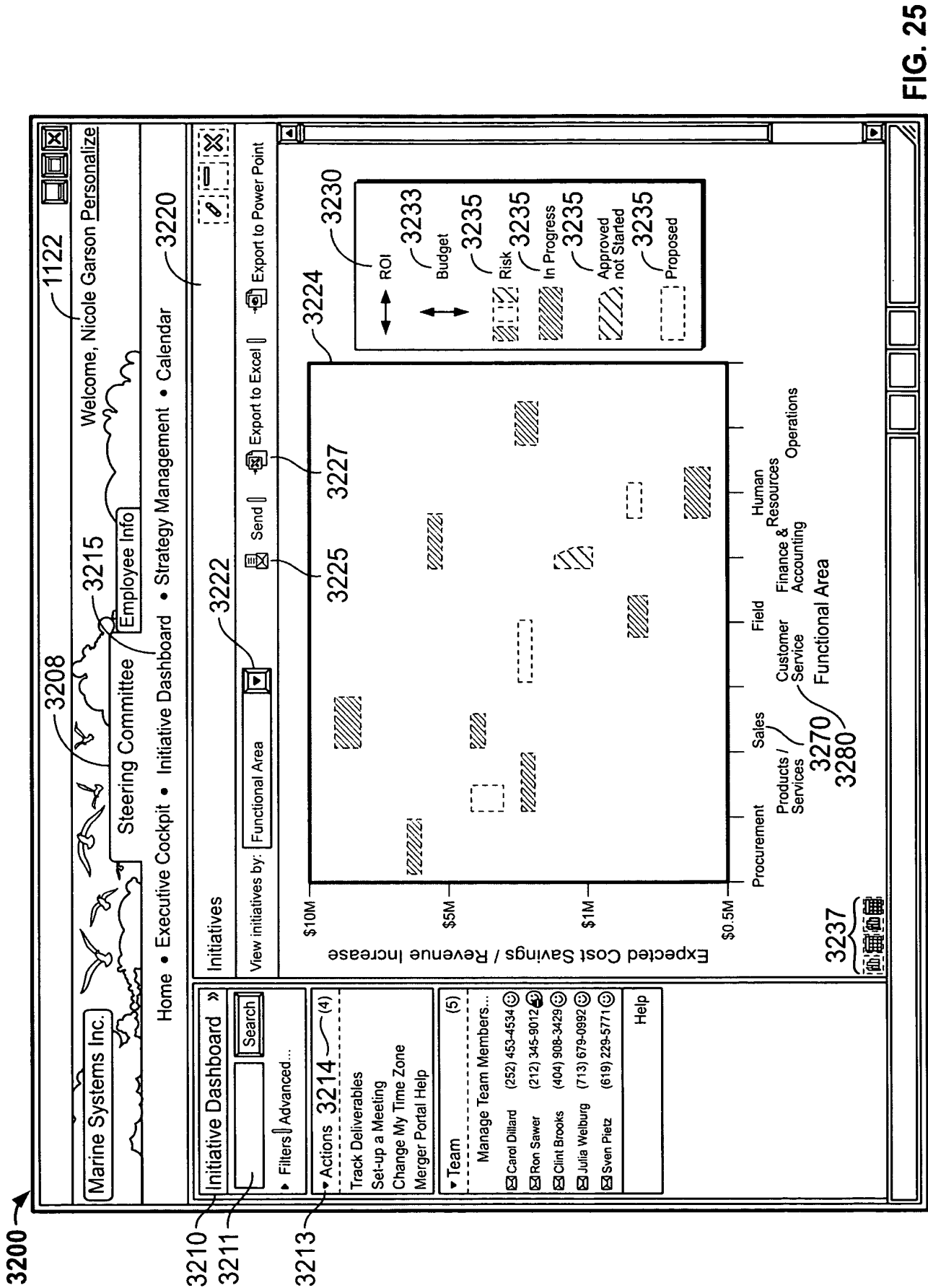


FIG. 24



3200

Functional Area (Initiatives)				Strategic Objective		Expected Cost Savings / Revenue Increase (\$)		Cost / Headcount		ROI (%)	
3240	3241	3239	3242	Risk	3243	3280	3244	3245	3246		
▼ Procurement	▼ Global SCM Solution			Low	Cost Savings			1,700,000 / 2	11		
▼ Products/Services (2)				Medium	Cost Savings			680,500 / 1	25.8		
Collateral Reproduction				High	Revenue Increase			500,000 / 1	10		
Service Bundle								180,500 / 0	15.8		
▼ Sales (2)								NA / 0	100		
Force Consolidation				Low	Cost Savings			NA / 0	100		
Customer Channels Realization				Low	Revenue Increase			NA / 0	100		
▼ Customer Service (1)								200,000 / 2	50		
Upgrade Services				Low	Revenue Increase			200,000 / 2	50		
▼ Field (1)								NA / 0	100		
Customer Acquisition				Low	Revenue Increase			NA / 0	100		
▼ Finance & Accounting (2)								128,900 / 1	17		
Financial System Consolidation				High	Cost Savings			108,900 / 1	6.8		
Process Re-engineering				Low	Cost Savings			120,000 / 0	10.2		
▼ Human Resources (2)								NA / 0	100		
Operations (1)								580,000 / 1	4.8		
Operations Expansion				Low	Revenue Increase			105,000 / 1	4.8		

FIG. 26